

Proposal on:

The Market for Building Insulation

Great Britain 2017

A Multi-Client Report



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Introduction

Construction Markets has been researching and reporting on the building insulation market for over 30 years. The reports, based on hundreds of in-depth interviews with a wide range of key specifiers, specialist contractors, manufacturers and suppliers of building insulation products and extensive desk research have gained a reputation for unparalleled detail and accuracy. The report is an essential tool for anyone wishing to identify market dynamics, shares and trends or indeed anyone just wanting reliable and detailed intelligence on the market for building insulation products.

Previously the data was contained as part of two other multi-client reports:

- The Total Roof Market
- The Total Wall Market

However, for the past 18 years it has been published as a volume in its own right. This has been an essential development as the market has seen such substantial and rapid developments in terms of both product shares and overall volumes, especially with the numerous changes in Part L of the Building Regulations (covering thermal insulation).

Originally the report was produced bi-annually but, at the request of subscribers, it is now published annually.

Note: *We will also publish the following multi-client reports covering the markets in 2017:*

- *The Market for Roof Claddings*
- *The Market for Roof Tiles*
- *The Market for Flat Roofs*
- *The Market for Wall Claddings*
- *The Market for Rainscreen Claddings*
- *The Market for Bricks*
- *The Housing Market by Types of Construction*

Separate proposals are available covering these reports; please contact us for more information:

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Report Contents

The following data will be provided on the market for building insulation in Great Britain in 2016 and 2017:

1 - Market Size

The estimated market for building insulation in Great Britain in 2016 and 2017 in terms of installed area (in m²).

2 - Segmentation by Types of Products

The total market for building insulation in 2016 and 2017 will be segmented by the following types of insulation products:

- Mineral wool:
 - Rolls
 - Blown
 - Slab
- PIR / Polyurethane
- EPS
- XPS
- Factory insulated composites
- Phenolic
- Multi Foils (aluminium bubble, Tri Iso etc.)
- Composite insulants used on flat roofs
- Insulated cassettes
- Other blown insulation
- Others (cellulose, sheep wool etc.)

3 - Segmentation by Building Sectors and Types of Work

The market for building insulation by types of products in 2016 and 2017 will be further subdivided within each of the following building sectors and types of work:

- **Private housing:**
 - New buildings:
 - Houses
 - Low rise flats
 - High rise flats
 - Extensions
 - Refurbishment
- **Non-domestic buildings:**
 - New buildings:
 - Offices
 - Retail
 - Leisure
 - Public education
 - Public health
 - Other public
 - Other private
 - Extensions
 - Refurbishment
- **Public housing:**
 - New buildings
 - Houses
 - Flats
 - Extensions
 - Refurbishment
- **Industrial buildings:**
 - New
 - Extensions
 - Refurbishment

4 - Segmentation by Applications / End Uses

The market for building insulation by types of insulation and building sectors will be further subdivided by the following applications / end uses:

- **Roof Insulation:**
 - Loft insulation
 - Warm roof
 - Industrial roof insulation
 - Flat roof:
 - Under deck
 - Over deck

- **Wall Insulation:**
 - Cavity infill
 - Framed construction
 - Industrial wall insulation
 - Curtain walling / rainscreens
 - External wall insulation
 - Other wall insulation

- **Cavity Wall Insulation:**
 - Cavity infill:
 - Full fill
 - Partial fill
 - Blown / pumped

- **Ground Floor Insulation:**
 - Between joists
 - Under slab

Note: *The data stated in items 2, 3 and 4 will be provided in a series of cross related matrices in Excel format. This is due to the complexity of the data and the tables not being legible within a PDF report format.*

Example tables are available upon request.

5 - Trend Data

The changes and developments in the building insulation market in terms of size and segmentation back to 2010 will be examined. This will include data shown graphically and in tabular form with relevant commentary.

Detailed trend data will be provided for each of the following types of products:

- Mineral wool
- PIR / polyurethane
- EPS
- XPS
- Phenolic
- Others

6 - Forecast to 2021

A forecast of the likely development of the market will be made for the period up to 2021 and this will cover the following:

- The likely changes in building sector activity levels by the main sectors:
 - Private housing
 - Public housing
 - Non-domestic buildings
 - Industrial buildings
- The projected changes in product usage for all of the main types of products (as listed above under item 4).

The forecast will be based on the following:

- The unique Construction Markets computer-based forecasting model
- A full and detailed analysis of all relevant macroeconomic and other available data and statistics
- Information from the comprehensive field research programme

Research Programme

The data required will be collected from the following research programme:

1 - Interviews will be conducted with the following types of respondents:

- House builders
- Specifiers designing non-domestic buildings
- Specialist sub-contractors supplying into the insulation market
- Segments of the distribution network for insulation
- Manufacturers supplying into the insulation market
- Others as identified as being relevant sources of information

Over 600 telephone interviews have been conducted with these types of respondents during 2017.

2 - A major programme of desk research will also be conducted consisting of the following:

- Collection and analysis of all published and other obtainable statistics from both public and private sources
- Information from the unique database held by Construction Markets which has been updated annually since the consultancy was started over 40 years ago
- Data collected from the Internet

Fees & Timings

Fee Structure

The fee for the study on The Market for Building Insulation will be:

- £3,950 +VAT per subscriber

This fee will be invoiced in the following stages

- 60% upon delivery of the draft report and dataset
- 40% on delivery of the final report and dataset

The draft and final reports and datasets will be supplied in electronic format as follows:

- Draft Data - MS Excel format
- Final Report - PDF format
- Final Tables & Dataset - MS Excel format

Note: The fee will be invoiced in full if the order is received once the draft data has been published.

Timing

The delivery dates for The Market for Building Insulation Report are as follows:

- Draft Dataset - July 2018
- Final Report and Dataset - July 2018

Terms and Conditions

The following terms of business apply to engagements accepted by Construction Markets Ltd. All work carried out is subject to these terms except to the extent that changes are expressly agreed in writing.

- Our terms of payment are strictly 30 days from the invoice date.
- The Copyright and intellectual property for any and all information supplied by Construction Markets in any format (contained in a draft report, final report, notes, ad hoc basis or otherwise) is retained by Construction Markets, although the fees you pay us allow you to use those materials for the purposes for which they were created under this engagement.
- Any and all information supplied by Construction Markets in any format (contained in a draft report, final report, notes, ad hoc basis or otherwise) must not be copied, distributed or in any way disclosed outside of the client company (or its group) without the prior written consent of Construction Markets. We recognise that there may be circumstances where you wish to disclose copies of a report we produce for you to other third parties. We may provide consent to such disclosure on condition that the third parties in question sign a hold harmless letter, a reliance letter or an engagement letter in each case in a form acceptable to us. Neither we nor our employees, consultants, agents or directors assume any duty of care to such third parties and we disclaim all responsibility for any consequence whatsoever should any such third party rely upon any report, letter, information or advice without our first having given our written consent that such third party may do so. Our only responsibility in relation to our reports and advice in connection with this engagement is that which is owed to you in the context of this engagement as at the date on which our report or other advice is given to you.
- Where we receive confidential information, we shall take such steps as we in good faith think fit to preserve confidential information from unauthorised disclosure or other misuse both during and after termination of this engagement. If, we nevertheless disclose without authorisation or otherwise misuse your confidential information, thereby causing you loss, we shall be liable to you. Save where there is specific agreement to the contrary, our client relationship with you shall not be treated as confidential information and we may disclose this fact to clients, prospective clients, or other third parties.
- We will provide you with data and services described in this engagement letter and the accompanying document describing the research scope in a timely manner. In the unlikely event that delays occur then these will be promptly advised by email.
- All reasonable endeavours will be made to ensure the accuracy of all data that is supplied and this will be based on the agreed scope and no warranty or representation is made by us as to the completeness of the data or reports or the accuracy of the information we have relied on.
- You agree that any commercial decisions that you make are not within the scope of our duty of care and in taking such decisions you must take into account the restrictions on the scope of our work and other factors, commercial and otherwise, of which you and your other advisers are, or should be, aware from sources other than our work.
- The aggregate of our liability for all Relevant Losses to the Recipient Parties shall be limited in total to ten times our paid fees for this engagement.
- You acknowledge that our employees, consultants, agents or directors do not assume any duty of care to you in a personal capacity. You shall not bring any claim in respect of any Relevant Losses against any of our employees, consultants, agents or directors personally.
- We will not be liable to you for any claim in relation to our reports and advice to the extent that you have a right of recovery from any other person.
- We will not be liable to you for any claim in relation to our reports and advice to the extent that you were aware of the fact, matter, event or circumstances giving rise to the claim prior to the date of the relevant report or advice.

Order Form

To:

Construction Markets
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Lymington SO41 8XD

Email: dominic@construction-markets.co.uk

I would like to subscribe to **The Market for Building Insulation Report 2017** as described in the proposal and hereby agree to the terms of conditions contained therein.

My details are as follows:

Name: _____

Company: _____

Position: _____

Address: _____

Tel: _____

Mobile: _____

Fax: _____

Email: _____

Please invoice me for the relevant stage payment(s) as applicable.

Signed:
